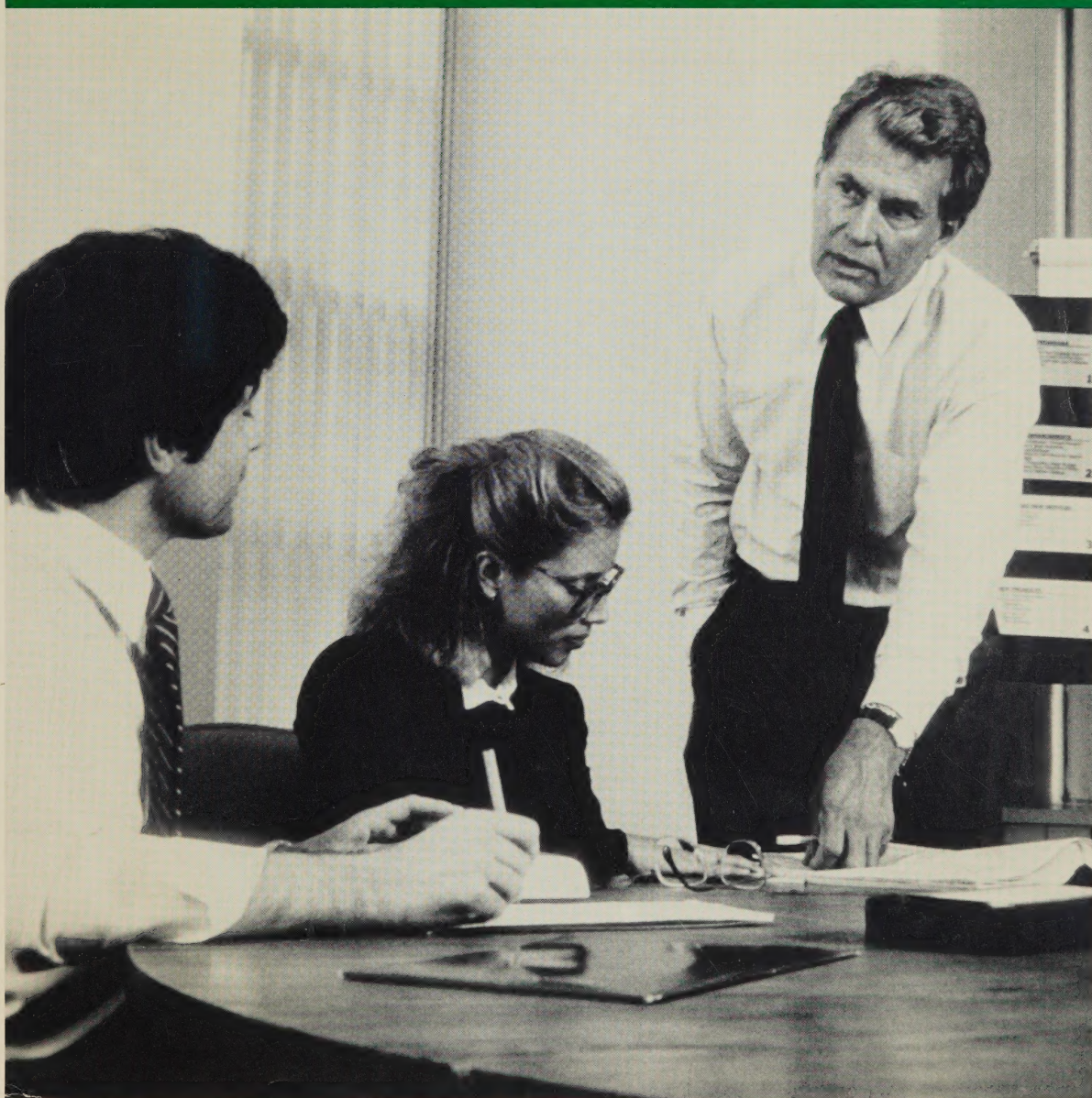




Better Planning for Better Recreation

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Introduction

Sound planning is vital for improving community recreation services in Ontario.

This manual is a quick reference guide to ten types of planning activities. Whether you are developing a master plan for community recreation or organizing a meeting, the step-by-step process described here will help.

Good planning helps an organization clarify its goals and objectives thus leading to effective action and, ultimately, to improved recreational opportunities in the Province.

In preparing this condensed guide, the ministry has worked with recreation practitioners in central and eastern Ontario. Their assistance and guidance is very much appreciated.

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The Planning Process

- What do you want to do? = Purpose of your organization and its goals and objectives
▼
- What information do you need to understand the situation better? = Data collection and analysis
▼
- What options are available and which option is best? = Plan formulation
▼
- How to make the best option work? Plan specific action steps. = Implementation strategy
▼
- Did it work and what's the impact? = Evaluation

Planning for Recreation Services

<div>Many</div> <div>↑</div> <div>Number of issues and/or number of people involved</div> <div>↓</div> <div>Few</div>					Comprehensive Recreation Planning 📖 Page 4
				Strategic Planning 📖 Page 4	
			Program Planning 📖 Page 5		
	Financial Planning 📖 Page 7		Feasibility Study 📖 Page 6	Operational Review 📖 Page 5	
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	Meeting Planning 📖 Page 8		Building Programming 📖 Page 6		
<div>Specific and short term</div> <div>Impact on Recreation services</div> <div>Broad and long lasting</div>					

The Planning Process

Planning is a way of deciding about a future course of action. Planning is an active process involving people who want to determine, implement and evaluate the best course of action for achieving their goals. Planning helps you to anticipate and avoid road blocks to achieving your goals. Take the initiative. Plan, don't wait and react to problems.

1. Set goals and objectives

- Goals are the long-term ideals that you strive for. They give purpose to you and your organization.
- Objectives are the short-term achievable steps to reaching goals. They help you to measure your progress.

2. Review and study the situation

- In order to make informed decisions you need information.
- Identify and collect data on resources, problems, issues and concerns.

3. Select a course of action

- Review your options. What is the best means for reaching your goal?

4. Implement action

- What actions are now required?
- Action plans describe how, when, where, who and how much. They are specific and measurable.

5. Evaluate the results

- Have you accomplished your objectives? What progress has been made towards reaching your goals?
- Are you becoming better about deciding on where you want to go and how you are going to get there?

Key Principles in Planning

There are three basic principles that you need to consider when planning:

1. **the human factor**
2. **citizen involvement**
3. **action orientation**

Planning is a process used by people in an attempt to reach a goal or create a product. Different approaches are used to plan for a committee meeting, or to plan co-operative services with other municipalities. But, in each case these three principles apply.

1. The Human Factor

Planning is done by people. Your co-workers, fellow committee members and associates. It is not always realized, but the quality of the product depends on how your group works together. The satisfaction with the process, the interaction, dialogue and communication amongst committee members needs to be given close attention. The management of these relationships is ultimately what determines success when planning. People need to feel valued, to be able to raise differences, and to say what they think as they work together. These facilitation skills can be learned and the effectiveness of your group can be improved.

2. Citizen Involvement

Involving others outside of your group is the second factor that guarantees results. The private sector calls this activity 'market research'. Before spending time and money on a new product, they find out what people will buy. The same principle applies to recreation planning. Your meeting will be successful if you discuss the agenda with those who will be attending. Your community recreation services will be more effective if you survey citizens regarding their interests. Your new facility will be more efficient if you talk with potential users first. Involving people requires time. People need to be given adequate time to do their own research and to prepare their own interpretations of the issues. If you really want their involvement, give them at least as much time as you have taken.

3. Action Orientation

Planning leads to action. Planning helps you to make better decisions. Planning shows how to solve problems. Plan a meeting, then hold the meeting. Plan a budget, then use the budget. Plan community recreation services, then bring all the organizations and institutions together to develop better services. Plan to act. If you have involved all the people who will be affected and have analyzed the available resources, you will be able to proceed.

Comprehensive Recreation Planning

Definition

Broad based, future oriented reviews of community recreation services, usually under the leadership of a municipality, that involves all recreation service providers.

WHO DOES IT?

- Usually it is carried out by the municipality. It should be concerned with all recreation services in the community, not just those provided by the municipality.
- It should be a cooperative effort involving community groups, school boards and all other recreation providers in the community.

WHY DO IT?

- To help the municipality and other recreation providers to make rational, informed decisions about the development of future recreation services.
- To help to avoid gaps in recreation services and the duplication of facilities and programs.

WHEN SHOULD IT BE DONE?

- When a municipality has confidence in its ability to act as a co-ordinating body for all community recreation services.
- The process usually results in a five year plan for the development of recreation services. It should be reviewed at least annually to update information used and to take advantage of experience gained in the last year.

HOW IS IT DONE?

- **PREPLANNING** — Determine whether there is a need for comprehensive recreation planning.
- **TERMS OF REFERENCE** — Determine the objectives of the planning process, who should be involved, how long the process should take, etc.
- **DATA COLLECTION AND ANALYSIS** — Collect information on the existing recreation services. What services are available, how good are they, who is providing them, what will be needed in the future?
- **GOALS AND OBJECTIVES** — Establish the goals and objectives for recreation services in your community.
- **ALTERNATIVES** — What are your options for developing recreation services to meet your objectives? What are the costs?
- **SELECTION OF ALTERNATIVES** — Determine the best of the possible ways to reach your recreation goals and objectives.

- **IMPLEMENTATION PLAN** — How will your objectives be accomplished? Who will implement them? When?
- **EVALUATION** — Review your plan annually to see if new circumstances or trends will alter your plans.

Strategic Planning

Definition

A process closely related to comprehensive recreation planning that a recreation agency uses to develop a broad plan of action for dealing with major emerging issues, opportunities or needs for improved performance or service.

WHO DOES IT?

- Any recreation agency or organization which is concerned about the long-term development of their organization.
- Usually involves senior managers, a board of directors, a recreation committee or a recreation department or agency.

WHY DO IT?

To help the department, agency or committee to re-assess the fundamental reasons for their programs and policies and to determine their effectiveness in meeting client needs.

WHEN SHOULD IT BE DONE?

- A major issue has surfaced which must be addressed.
- The organization feels that an improved level of performance is required.
- The organization wants to become involved in a new opportunity or service.

HOW IS IT DONE?

- **PREPLANNING** — What are the areas of strategic interest? How will the process be managed and who will be involved?
- **ASSESSMENT** — Evaluate the existing situation to determine strengths, weaknesses, problems and opportunities.
- **STRATEGY DEVELOPMENT** — Establish new directions through goal, objective and policy development. Examine program and policy options.
- **IMPLEMENTATION** — Communicate decisions, assign responsibility and check on progress.
- **EVALUATION** — Review the plan you have implemented. Is it on target? Are your objectives being accomplished? Are changes in your plan necessary?



Program Planning

Definition

A process by which needs are identified and program services are developed in order to meet those needs.

WHO DOES IT?

- Service clubs, community groups, recreation committees and departments.
- Those people in an organization who are involved in providing program services.
- Groups or organizations interested in adapting to changing community needs. It is done collaboratively, in conjunction with others outside the organization.

WHY DO IT?

- To improve the quality, quantity and effectiveness of services based on defined community needs.
- To ensure the effective use of all available resources.
- To help to avoid unnecessary duplication or gaps in services.

WHEN SHOULD IT BE DONE?

- Usually done on an ongoing, cyclical basis.
- It is probably already being done, on an informal basis at least, in most organizations. As community needs change, or as the level of service declines or participation drops, chances are that it's time to formalize the process.

HOW IS IT DONE?

- Needs assessment and problem identification.
- Goal and objective setting.
- Implementation strategy.
- Delivery of program services.
- Evaluation.

Operational Review

Definition

Involves a detailed problem-solving examination of an existing recreation operation such as a facility, program, department or agency. An operational review clarifies goals and objectives and outlines changes that will increase efficiency and effectiveness for reaching organizational goals and objectives.

WHO DOES IT?

- Any recreation agency or organization which has identified a problem or issue which threatens the effectiveness of the organization.
- Board of directors, executive committees and managers of the organization.
- May be done by professional staff from within the department or agency. Outside expertise may be sought to provide an independent viewpoint and needed analytical skills.
- Should involve users and potential users of the service being reviewed.

WHY DO IT?

- To solve a critical operational problem which jeopardizes a service.
- To find solutions to staffing and operating practices for programs and facilities.
- As part of on-going healthy management practices.

WHEN SHOULD IT BE DONE?

- As soon as a problem is detected or when the possible effectiveness of the organization can be improved.

HOW IS IT DONE?

A problem solving approach can be used to:

- Identify and analyze the problem.
- Identify alternative solutions.
- Recommend a preferred solution.
- Implement the program to solve the problem.



Feasibility Studies

Definition

A process of collecting information regarding the development of major facilities in order to help in the making of sound decisions. Such studies recommend alternative courses of action in order to assist in the making of decisions.

WHO DOES IT?

Any organization which is considering developing a major facility and wants a way of making a rational and informed decision.

WHY DO IT?

To help to make decisions and to provide information and a comprehensive look at all of the alternatives involved so that the right decision is made. It balances quality of life with monetary concerns.

It involves more people in the community so that the new services and facilities will be effectively and efficiently developed.

WHEN SHOULD IT BE DONE?

- When the need for facilities has not been proven.
- When all alternatives have not been examined.
- When financial implications have not been accounted for.
- When consensus is being sought.

HOW IS IT DONE?

Two major components of a feasibility study are the identification of need and an assessment of the feasibility of the project.

- **NEEDS IDENTIFICATION** — Set objectives. Collect data on need for the facility. Select alternatives.
- **FEASIBILITY ASSESSMENT** — Describe alternatives and program potential. Determine space requirements. Make site selection. Establish capital cost and funding plus the operating cost. Work out revenue management. Develop action plan.

Building Programing

Definition

A planning process used by architects to determine requirements of the building's users. It precedes the design of a building. The building program states user requirements in terms of the space needed and the interrelationships of one functional area to another.

WHO DOES IT?

Any organization that has made a decision to build a new building or make major capital improvements to an existing building. It usually involves a specialist, e.g. architect, planner.

WHY DO IT?

- To determine size and interrelation of functional spaces in a building so that it is satisfactory for intended uses.
- To provide detailed information to the building designer on user requirements, e.g. space, types of equipment, ceiling height, number of participants, electrical, heating and lighting needs, storage areas, accessibility, etc.
- To help to match expectations of owner and users with the size and capabilities of a building that is affordable.

WHEN SHOULD IT BE DONE?

Before the building designer begins to work. It provides the designer with specific details on the intended use of the building and all related requirements.

HOW IS IT DONE?

The building owner works with a specialist, usually an architect or planner to:

- Interview potential user groups and staff of the new building to identify requirements.
- Review program with users and adjust space requirements to fit budget.



Land-Use Planning

Definition

Provides direction for the physical development of a municipality or planning area by indicating, for example, where industrial, commercial or residential development should take place. In Ontario the most widely known type of land-use plan is the official plan as defined in the Planning Act.

WHO DOES IT?

The elected councils of municipalities with opportunities provided for full public involvement.

WHY DO IT?

- To help to provide for the orderly growth and development of a community.
- Official plans establish such things as municipal policies for the acquisition of land for park purposes.

WHEN SHOULD IT BE DONE?

Each municipality develops an official plan and reviews it once every five years. Needed amendments are made with the approval of the minister of Municipal Affairs and Housing.

HOW IS IT DONE?

Land-use plans such as official plans are prepared by municipalities using their own staff and, as necessary, obtaining outside planning expertise. A land-use plan is based on detailed inventories of existing land-use patterns, biological and physical conditions, population and growth projections and other social and economic data. Extensive public involvement is utilized in order to make sure that all points of view regarding impacts of land-use decisions are considered.

Financial Planning

Definition

A process which helps managers to make decisions on long-term expenditures and revenues and to attain the financial objectives of the organization.

WHO DOES IT?

- Any organization which wishes to improve its financial performance.
- Managers who are responsible for the financial affairs of the organization.

WHY DO IT?

- To improve the financial performance of the organization.
- To enhance the efficiency of managers and decision-makers.
- Stating objectives clearly helps to avoid conflicts such as achieving short-term savings vs. providing quality services.

WHEN IS IT DONE?

A continuous process to provide a means for managers to make decisions which will help the organization reach long-term financial objectives.

HOW IS IT DONE?

- Formulate financial and corporate objectives.
- Develop policies, programs and procedures to pursue objectives.
- Determine resources needed to reach goals.
- Design the decision-making procedures needed to implement the plans and programs.
- Design a system to monitor performance on a continuous basis.



Personnel Planning

Definition

A process designed to provide the proper quantity and quality of personnel that will assist an organization in meeting its objectives and that recognizes how people work together.

WHO DOES IT?

- Any organization with either paid or volunteer staff which wants to provide a long-term plan for staffing, training, and personnel development.
- Upper level managers who see a need to plan for their staff needs and to allow employees to reach their potential.

WHY DO IT?

- To ensure that the organization has the right quantity and quality of personnel to satisfy its objectives and to provide for its future development.
- To give individuals in the organization support in their own development and to ensure that their capacities are made use of in the best way.
- To avoid surprises and crisis situations due to differences between the number and kinds of personnel which you employ now and may need to employ in the future.

WHEN IS IT DONE?

Personnel planning should be a continuous process. A yearly forecast of personnel needs will ensure that your organization is properly staffed and that you anticipate changes in the number and skills needed for people to perform their duties.

HOW IS IT DONE?

- Identify the goals and objectives of the organization as well as the specific personnel objectives.
- Identify your organizational system — the organizational structure, relationships, job descriptions, skills needed now and in the future to satisfy the objectives of the organization. This includes:
 - Staffing forecast: quantity and quality of personnel needed to achieve objectives and how they work together.
 - Personnel budget: structure and budget for the coming year.
 - Individual plans: measures which are needed to help people to perform their duties well.
 - Work team development.
- Detailed program of actions to attain the objectives.
- After implementing the program, evaluate the measures used and apply the experience to next year's program.

Meeting Planning

Definition

A way of preparing for or designing a meeting to enhance the chances for a successful result.

WHO DOES IT?

Anyone in an organization may have the opportunity to act as a meeting planner/organizer.

WHY DO IT?

- To run more organized and productive meetings.
- To save money, staff time, space and materials. A meeting with poorly planned objectives and an inadequate program to meet those objectives is wasting time and money.
- Good 'meeting planning' improves the process of all planning activities.

WHEN IS IT DONE?

Depending on the size of the meeting and the possible problems and complexities, the amount of time needed to plan the meeting varies. Try to set yourself enough time to plan the meeting, notify the participants, exchange any information and get agreement on the time, place, procedures and agenda.

HOW IS IT DONE?

- Determine the objectives of the meeting, the purposes and desired outcomes.
- Summarize information about the needs, interests, expectations of the participants. Are there any possible problems or conflicts?
- Design a program which will help to achieve the meeting objectives and to avoid problems and conflicts. Look at alternative activities, materials, human resources and agenda items.



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